

Behavioral Philanthropy Certificate

Program Outline (Nov 2025)

This Certificate in Behavioral Philanthropy offers advisors a unique opportunity to deepen their understanding of how behavioral science and philanthropic advising intersect. This program integrates multidisciplinary research insights, real-world examples, and practical case studies, equipping participants with the insights and tools to help their clients achieve their philanthropic goals.

Learning Objectives

- Identify and analyze the psychological factors that influence donor behavior, as well as the barriers they may face in their philanthropic journeys.
- Recognize the role of social and family dynamics in shaping philanthropic decisions, enabling you to understand diverse client motivations and engagement strategies.
- Apply behavioral insights through real-world case studies to develop and implement effective strategies that foster donor engagement and maximize philanthropic impact.
- Plan actionable strategies tailored to individual clients' needs, enhancing your ability to build strong relationships and drive meaningful change within the philanthropic landscape.

Module 1	Introduction to Behavioral Science
Module 2	Introduction to Donor Psychology
Module 3	Case Study: Understanding the Donor Context
Module 4	Behavioral Strategies for Advisors
Module 5	Behavioral Philanthropy in Practice

Module 1. Introduction to Behavioral Science

1. Introduction to the Course
2. Behavioral Science (Bsci) 101
3. What is "Context"?

4. Learning in Action: Behavioral Interventions in Water Conservation

5. Wrapping Up

Module 2. Introduction to Donor Psychology

1. Introduction

2. Common Behavioral Insights

3. Key Donor Psychologies

4. Wrapping Up

Module 3. Case Study: Understanding the Donor Context

1. Introduction

2. Case Study: Understanding the Donor Context

3. Case Study: Philanthropic Planning - Clients in Transition

4. Case Study: Philanthropic Planning for the Henderson Family

5. Wrapping Up

Module 4. Behavioral Strategies for Advisors

1. Introduction

2. The Donor Context

3. Top Behavioral Barriers for HNW Donors/ Overview of Top Barriers

4. Diagnosing Your Clients' Key Barriers

5. Cross-Cutting Advisor Strategies

6. Summary of Strategic Approaches for Donors

7. Wrapping Up

Module 5. Behavioral Philanthropy in Practice

- 1. Introduction**
- 2. Voice of a Philanthropist**
- 3. Voice of the Advisor**
- 4. Donor Journeys**
- 5. Professional Responsibility and Ethics**
- 6. Wrapping Up**
- 7. Certificate Completion: What's Next**

Questions? Email us - learn@daylightadvisors.com